SWYVEL

SWYVEL TRAINING MANUAL

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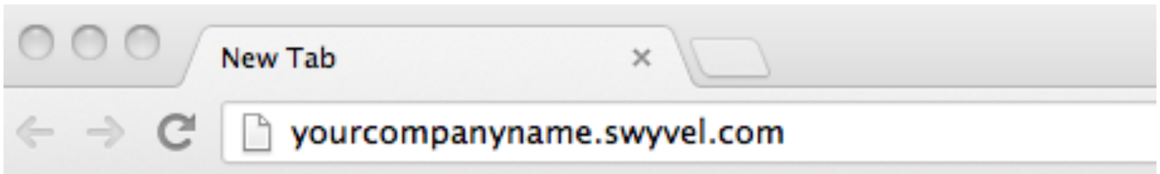
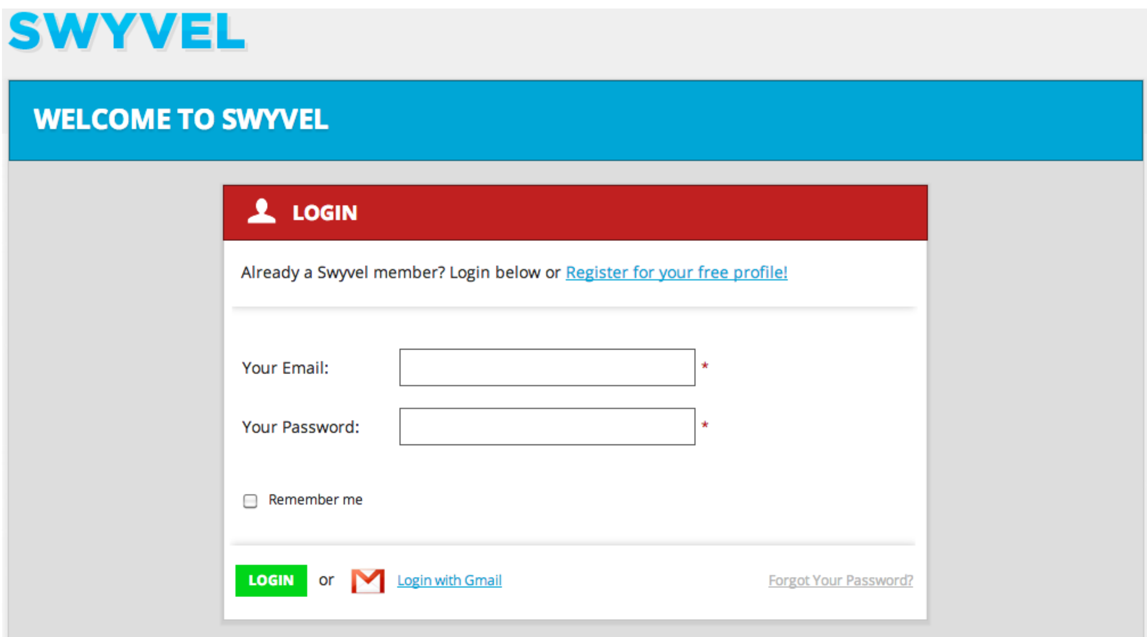
LOG INTO SWYVEL

- Navigate your web browser to your SWYVEL portal
    - This will be your companyname.swyvel.com



TOP TIP – Once you have arrived at your organizations SWYVEL page add it to your bookmarks bar.



- To log in to SWYVEL enter your email address and the password provided. Your Project Manager or Administrator will provide you with the access details that you require.

TOP TIP – selecting "Remember Me" will enable you to skip this step in future visits.

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As with most applications, you will notice that many of the modules have similar functions and work using the same logic. Same as your web browser, title tabs will move you between functions in a module.

Blue buttons 

will perform an action in the module in which you are working such as selecting people, or creating a new item.

Green buttons 

act to complete an activity and in essence you are telling SWYVEL to ‘go’.

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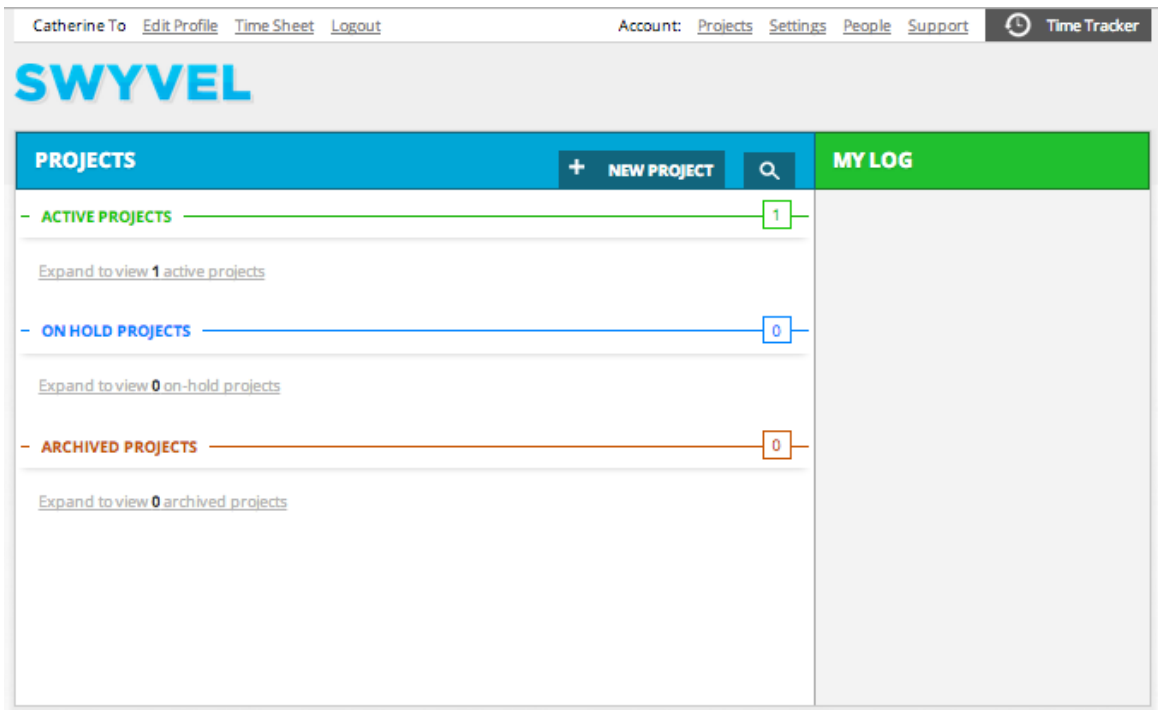
PROJECT INDEX

Once you log in to SWYVEL you will be directed to the project index. This page will show;

- Active Projects – projects that are currently running
- On Hold Projects – projects that are not active, but are still current and are expected to become active projects in the future
- Archived Projects – projects that have been completed and closed but are still available for resource viewing



- To create a New Project click 

TOP TIP – In this screen you can also click the magnifying glass next to New Project to Search within SWYVEL

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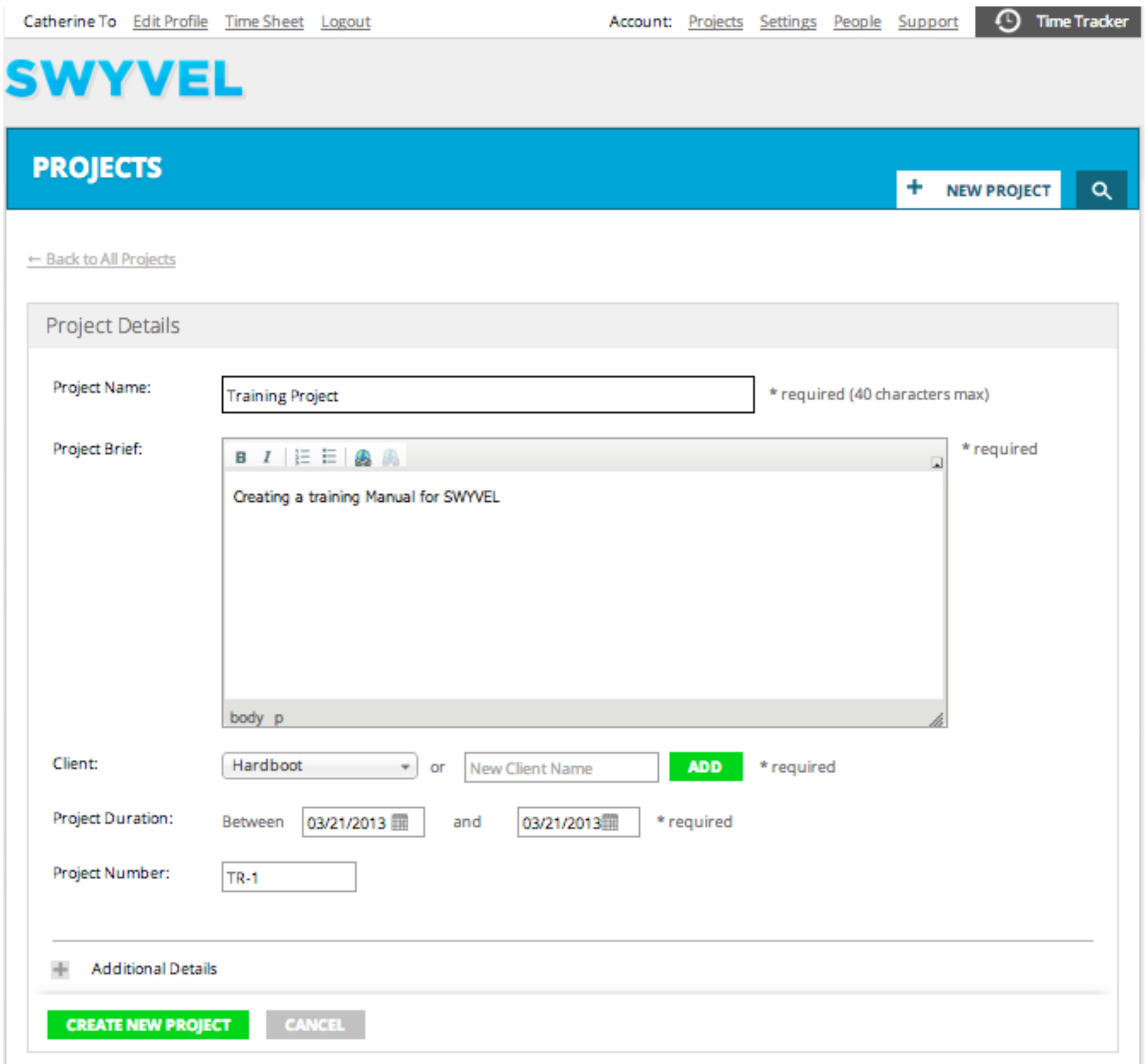
CREATE A PROJECT

- Fill in the project details



- When adding a client, you can either choose from the pre-populated drop down menu of existing clients, or add a New Client Name or business and click ADD

TOP TIP –To *create* a new company in the drop down list the Administrator will have to *create* a new company separately.

- Project Duration can either be manually input *MM/DD/YEAR* or chosen from the drop down calendar

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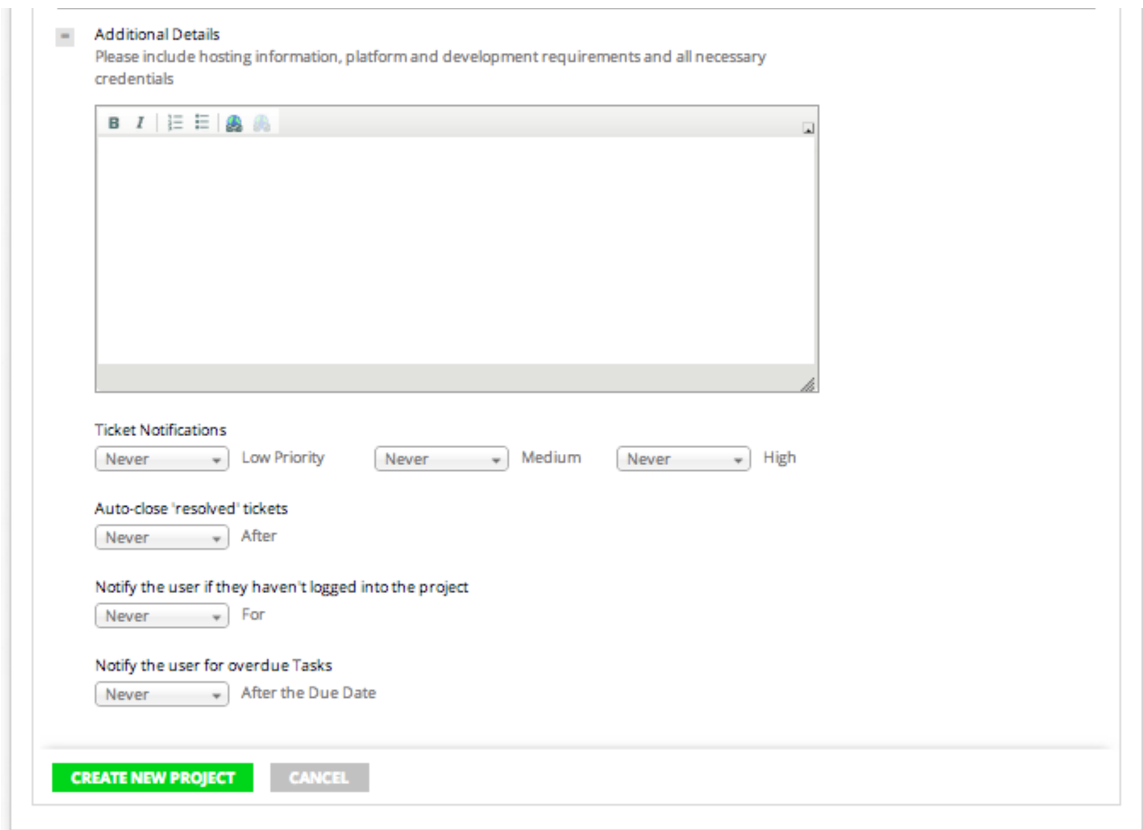
- Project Number will be a unique to your organization and will generally match a master project index. In this case TR (Training) 1 (training project 1)

- At this point you may either create the project by clicking CREATE NEW PROJECT or include more project information by clicking + Additional Details

- If you choose to add Additional Details the screen will expand.



- Additional details include development requirements such as platform, hosting information and also lets SWYVEL know how to deal with QA tickets and user activity.

TOP TIP – SWYVEL will use a small pop-up to let you know once you have completed a step or activity, or if you need more information.

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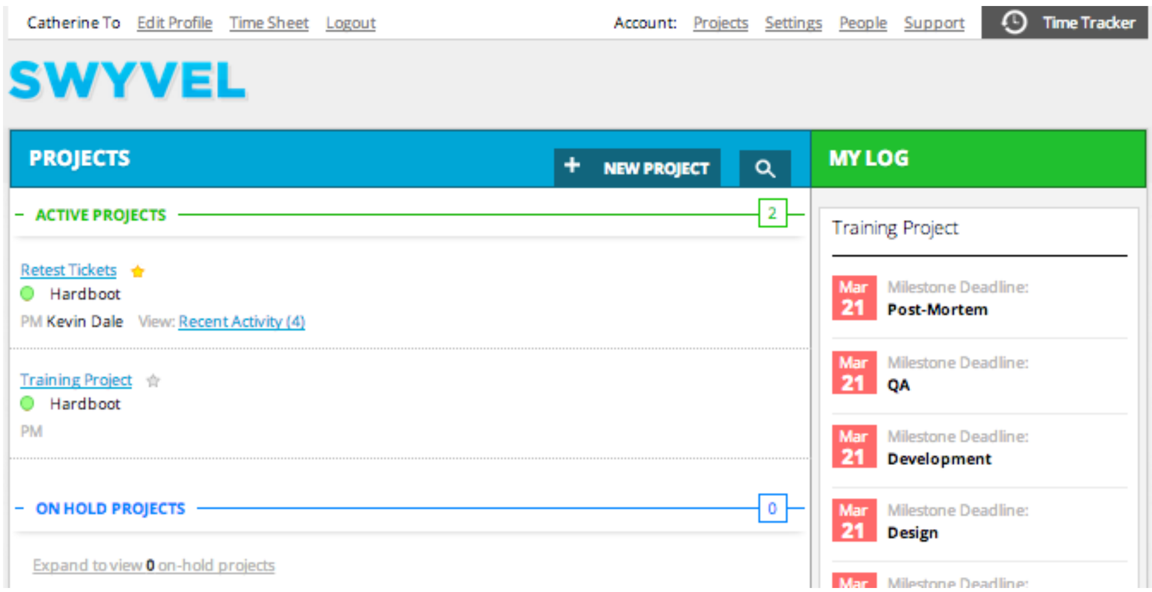
DASHBOARD

- Once you have created a project SWYVEL will return you to the Project Index.



- Expand the appropriate index under Active Projects, On Hold Projects or Archived Projects to view a list of the project titles.
- Clicking on your project will bring you to the Dashboard.

TOP TIP – Clicking on the star next to your project name will make it a favourite and keep it near the top of your list.

TOP TIP – Hovering over projects you own will enable you to edit the project and change its active status and edit the project details. Throughout SWYVEL the Edit/Delete function will appear in grey to the right of the item you hover over.

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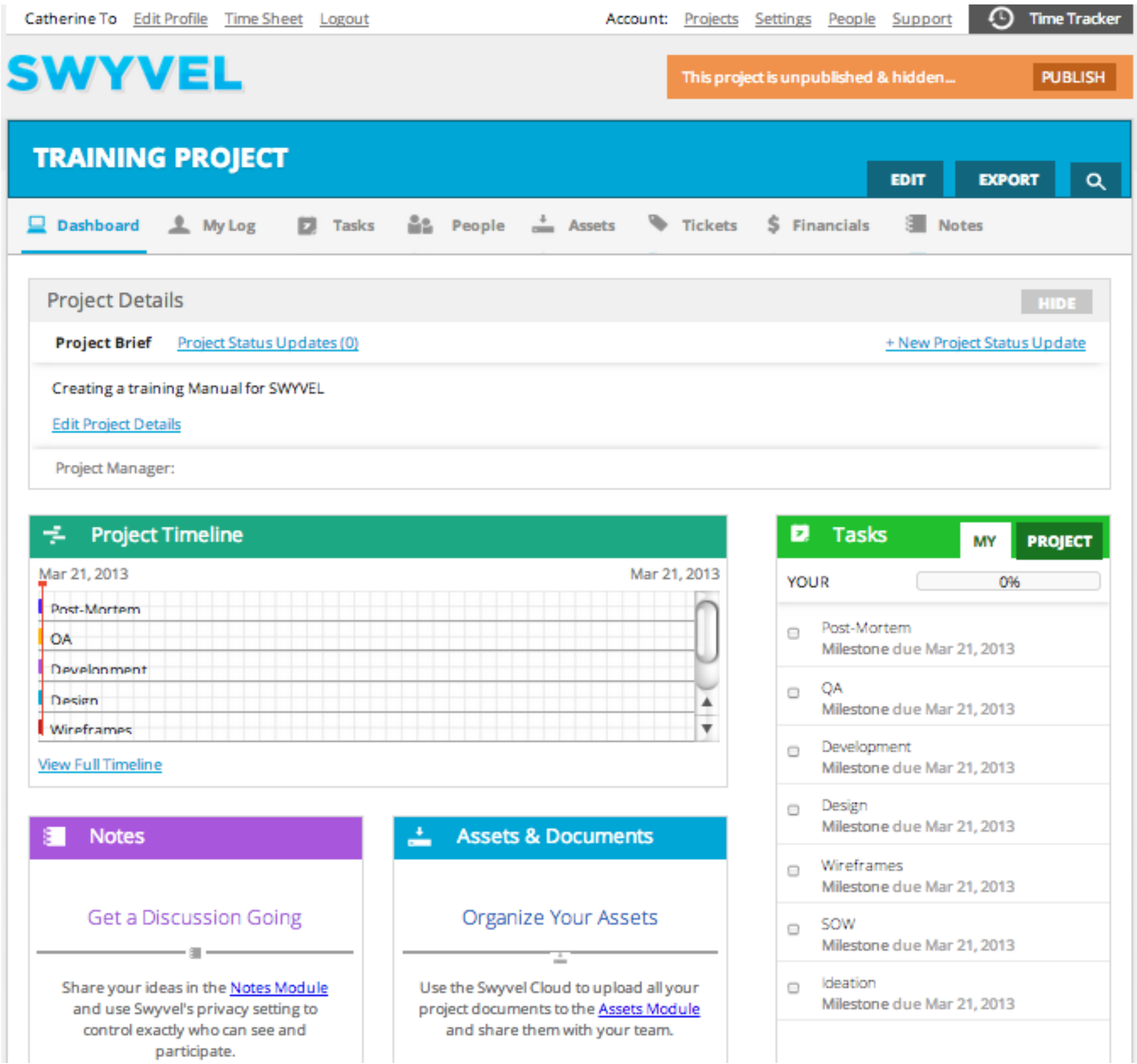
The project Dashboard is a one-stop overview of the project that you have selected. From the project Dashboard you can navigate through all the project modules.



- Project Timeline – The project timeline provides a snapshot of the project schedule and key project milestones. Clicking the project timeline title box will send you to the tasks module where you can edit and assign tasks.
- My Log – your project activity.
- Tasks – all project tasks as assigned and to who they have been assigned.

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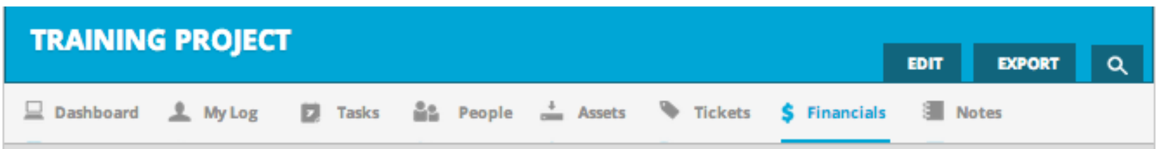
- People – all people involved in the project and their status
- Assets – Un-editable files that belong to the project.
- Tickets – project tickets for action and status.
- Financials – Overview of project income and expense.
- Notes – project notes including documents that project users may need to edit. Shared files and collaborative documents are uploaded here.

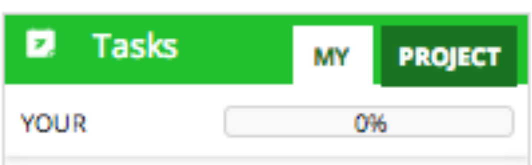
Each module will be discussed in detail in its own section of this training manual.

You can select modules using either the navigation bar.



or by clicking the title box on the desired module

In the Dashboard view, the Tasks title bar can toggle between tasks specific to you through clicking on 'MY', or all tasks related to this project by clicking on 'PROJECT'. Below the title is progress bar that delivers a snap shot of percent complete.



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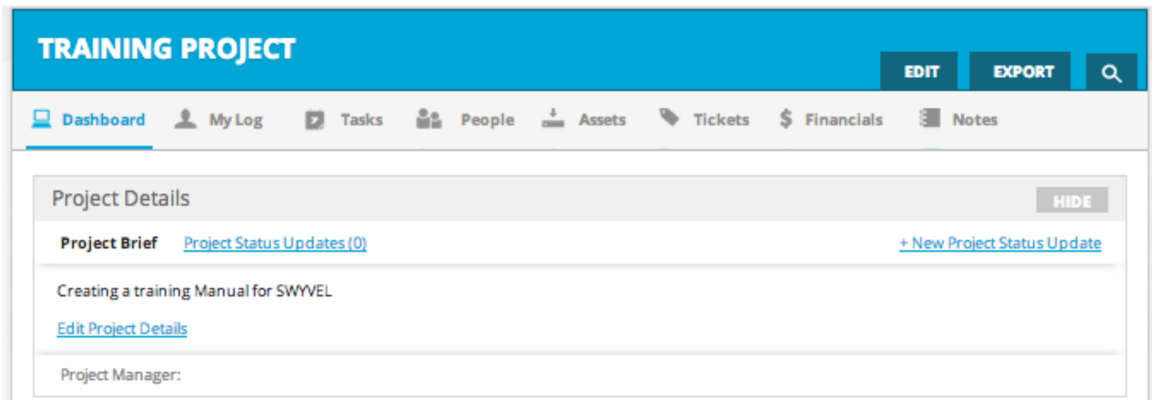
PROJECT DETAILS

The Project Details module is unique as it does not have a link on the navigation bar and can be directly accessed by clicking on the Project Details heading.



Through Project Details you can create and view status updates and edit project details.

TOP TIP – Clicking on the project title banner will return you to the dashboard view where you can have a full overview of all the project modules.

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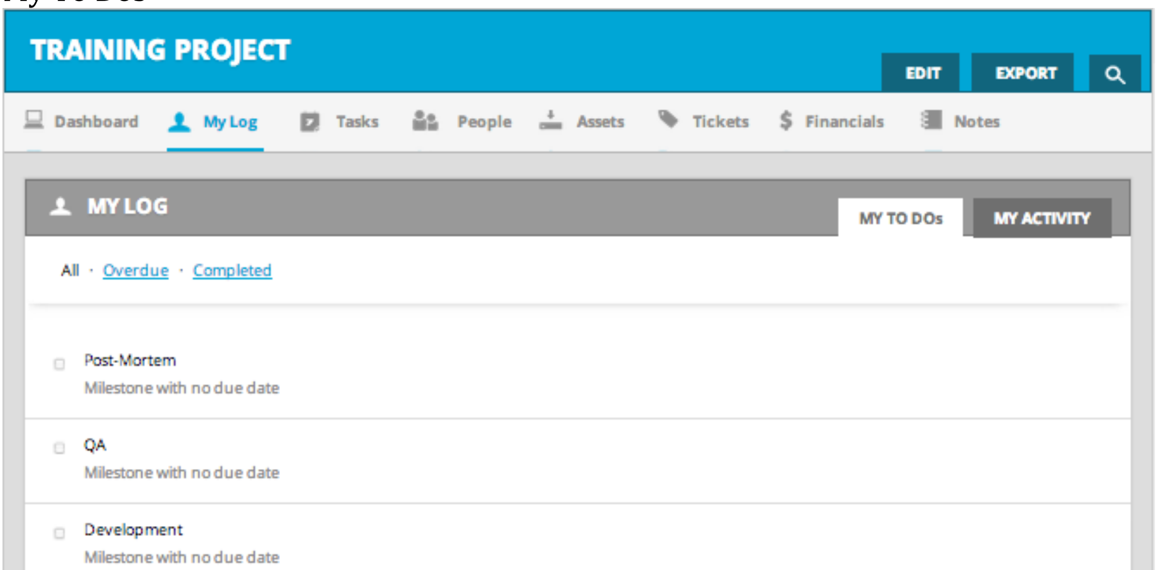
MY LOG

My Log is simply shows all tickets and tasks that are assigned to you, in order of priority.

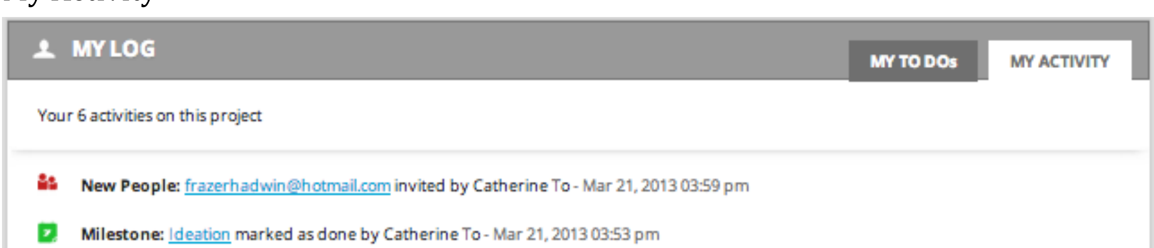
My To Dos



'My To Dos' can be filtered to show all tasks and tickets, completed tasks and tickets or overdue tasks and tickets as needed. In the 'All' view, tasks will be show in the order of overdue tasks first, active tasks second and finally completed tasks.

Unopened items will appear in the list in **bold type**. When a ticket or task is marked as complete it will appear in My Log with a check mark next to it.

My Activity



'My Activity' will show the all your activities over the lifetime of the project. Activities will be show in reverse chronological order and will be accompanied by an icon that identifies the module that activity belongs to.

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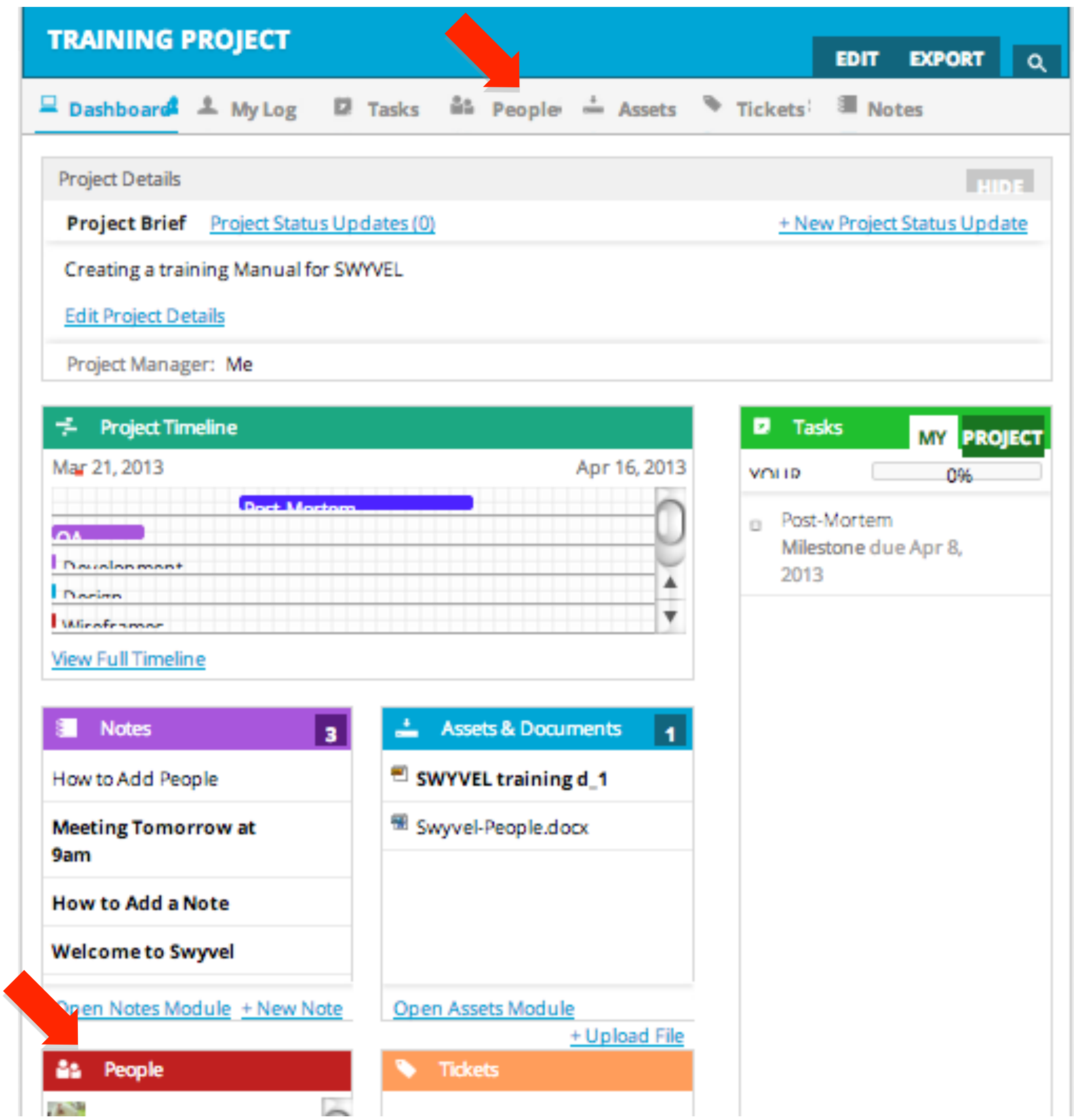
PEOPLE

Add people to your projects

★ TOP TIP - Only project manager and administrators are allowed to a people onto projects

- To add a people to your project, click on People module either from the top navigation bar or the banner of the People module from the dashboard



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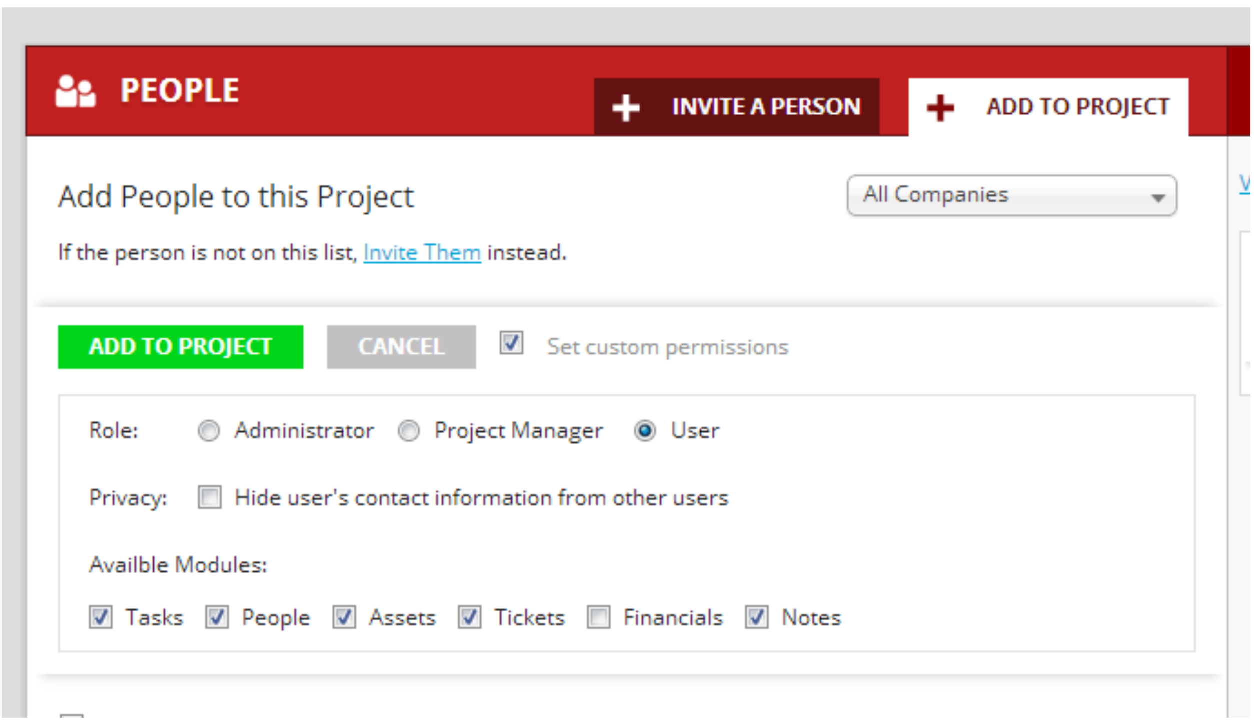
Adding People from Pre-Populated List

- If the person or persons you want to add are already added in your company, click on + People
- Select those persons you want to add to your project by clicking on the box besides their name
- After clicking on the number of names of individuals you want to add to your project, you may assign their role and set their permission to allow them access to certain modules by clicking on the small box besides Set Custom Permission. At this point all these individuals will have the same level of permission.



Custom Permissions

Administrator: Has the capabilities to add people to projects, edit project details and see the overall assets and notes occurring in the project with or without permission to be view

Project Manager: Same capabilities as an administrator

Users: Has the abilities to only view the modules they are granted by the administrator and project managers

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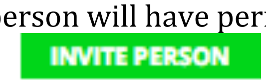
Privacy: Checking this box, hides the user's contact information from others

Available Modules: Activating these modules gives the person/persons to have access to these modules

- After selecting your team, assigning their roles and completing permissions for person/persons, click 

Inviting a New Person to Your Project

This option is available to add people who may not be a part of your company and is a temporary client/employee in your project

- Click on + Invite Person
- Enter the email address of the person whom you want to add
- Click on the company which you want to add the person to (if this applies)
- Assign the person with a role
- Select the modules which the person will have permission to
- Once you are done, click on 

- An email will be sent to the person you wish to add to your project with instructions to login in Swyvel

TOP TIP - Creating a group within your projects makes tagging people to assets and tickets faster and easier

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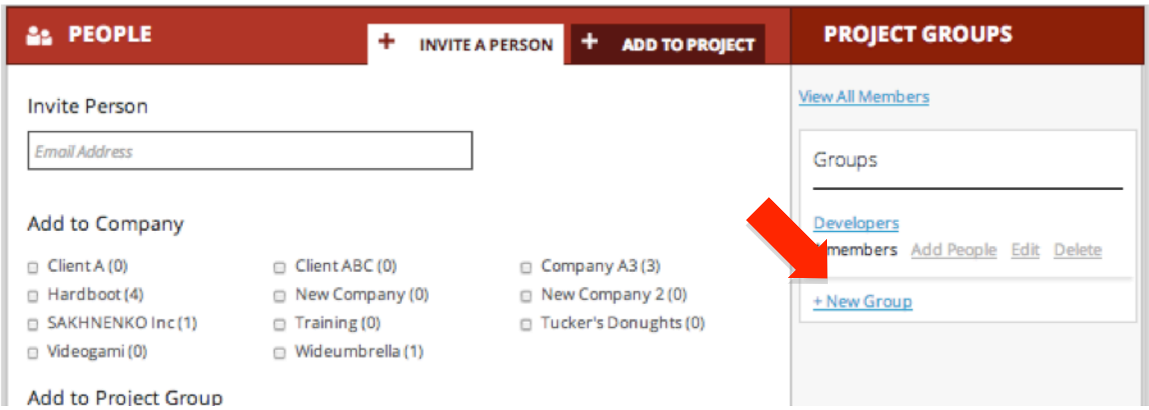
CREATE A GROUP

Creating a group is a great way to group a certain number of people who are would frequently be responsible for certain tasks, ie. Managers, designers, project coordinators etc.

- Click on + New Group under Project Groups on your right



- Type in your group name in the box then click on Create Group

- When the group is created, click on Add People and select those persons who will join that group and then click Add to Group

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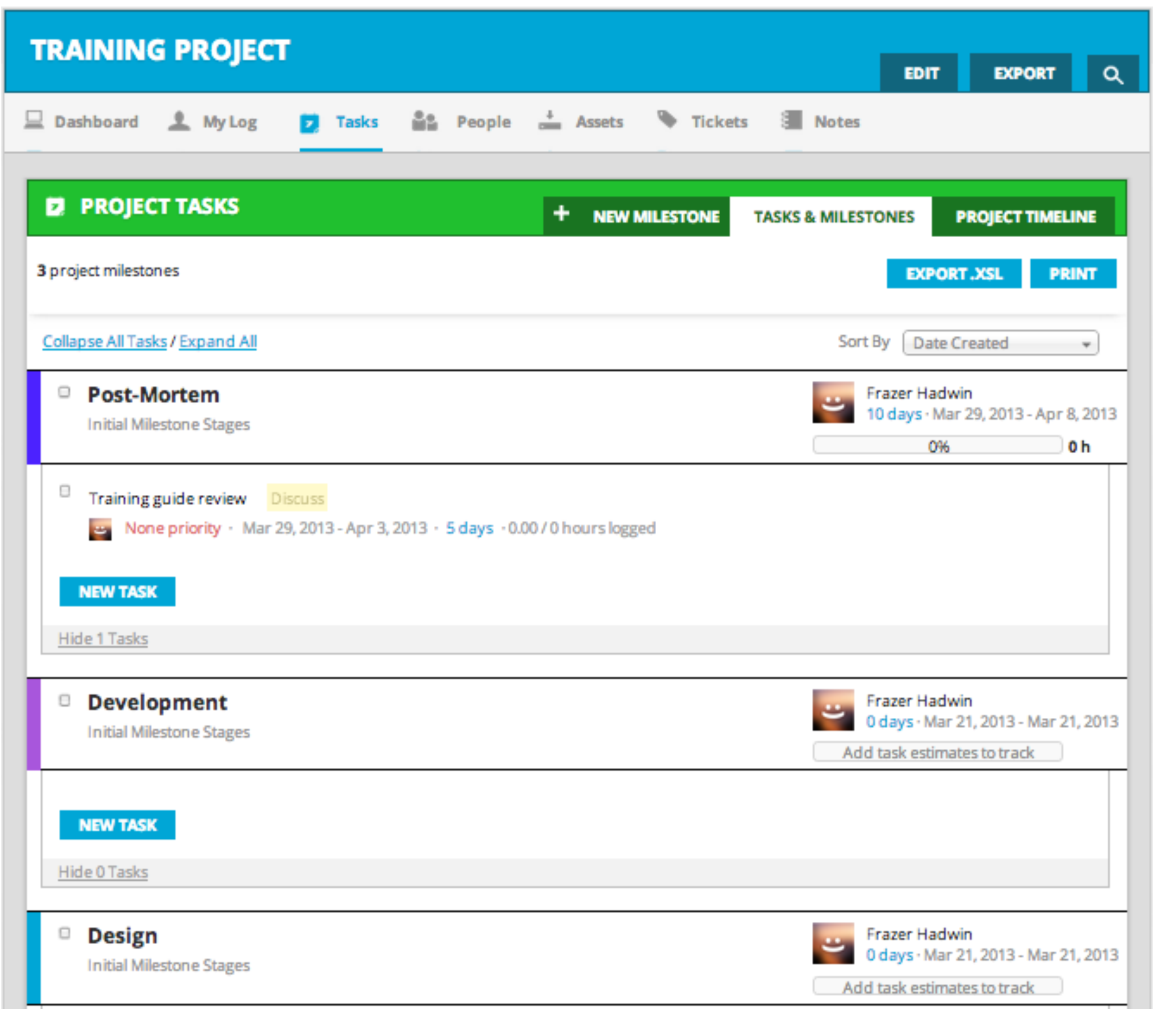
TASKS AND MILESTONES

The tasks and milestones module enables you to create and assign project milestones and tasks.

Milestones are major project components such as Ideation, Design, Development, Quality Assurance etc. Tasks are sub-items within milestones that impact the completion of its associated milestone.

TOP TIP – Only Administrators or Project Managers may add, assign or edit tasks. People designated as 'Users' may only view tasks assigned to them and designate tasks as complete or incomplete.



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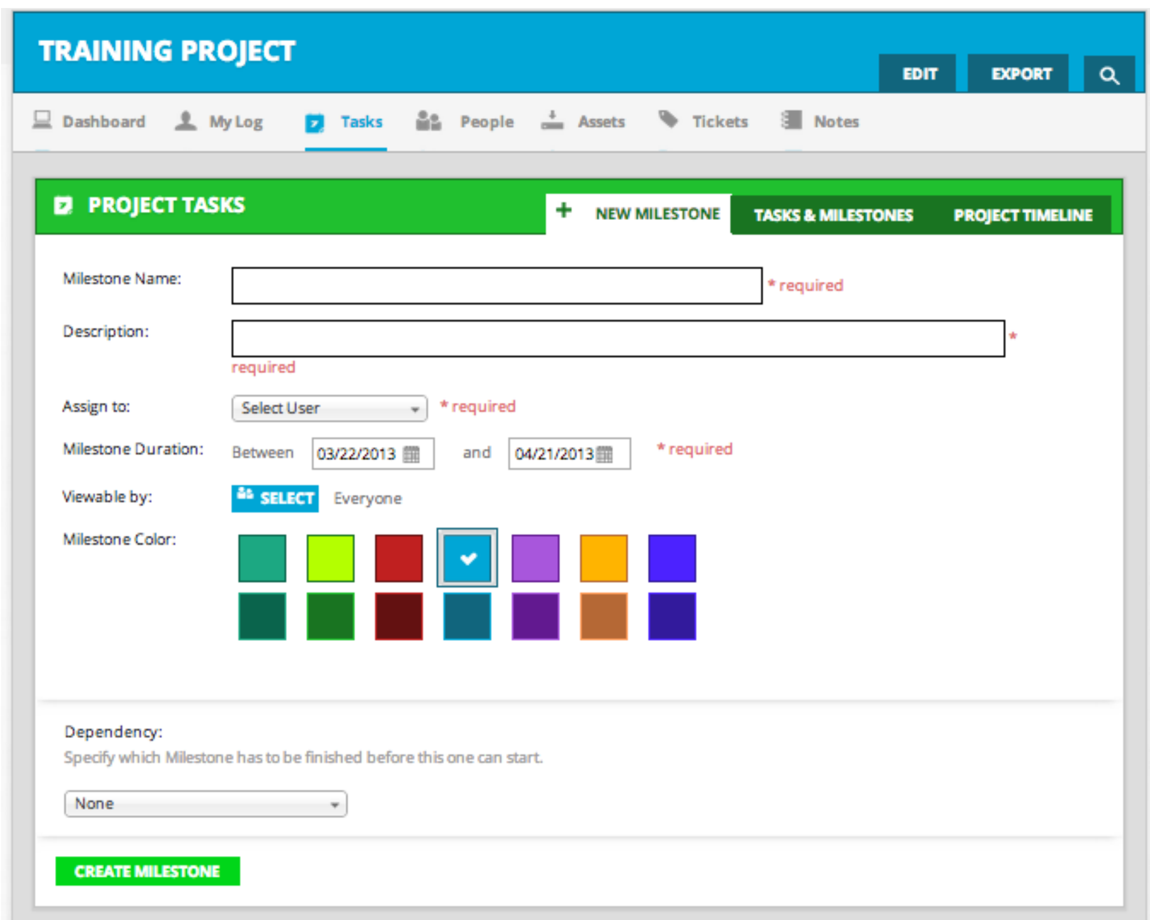
When you arrive on the Project Tasks Screen you will see all the Milestones and Tasks that are assigned to you. As a PM you will see all the tasks that and to whom they are assigned.

On the main Task module screen you have an overview of tasks that you are working on or have been given permission to view. From this screen the Project Manager can also view the number of hours budgeted for the activity against the number of hours logged against the activity by the task

Only users designated as Project Managers or Administrators will see the New Milestones tab shown below. You may view a Gantt style project timeline by clicking on the Project Timeline tab In the Project Tasks title bar.

To add a Milestone, click on 

This will open the New Milestone screen



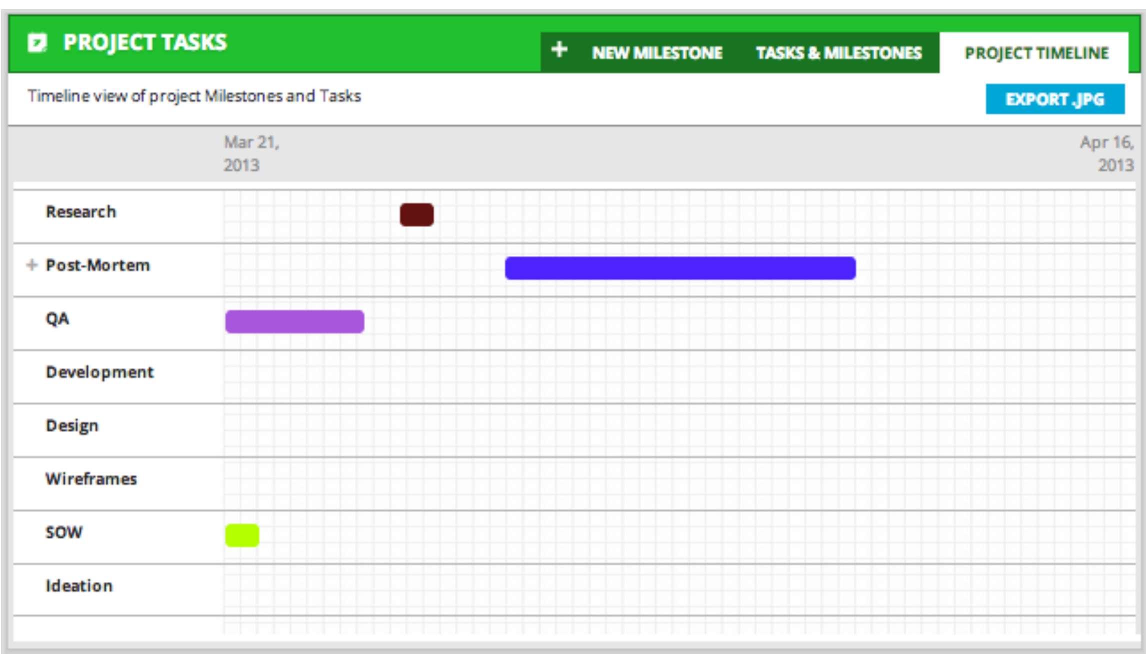
- Name the Milestone and provide a short description
- Assigning the Milestone will cause it to appear in the appropriate persons task list.
- You can choose who can view the milestone by clicking on SELECT
- Once you have filled in all the required information for the Milestone click on CREATE MILESTONE

TOP TIP – Sketch out your project timeline and milestones on paper before adding them to SWYVEL. By doing this you will have a clear idea of start and end dates and any overlaps.

TOP TIP – Creating a Dependency for a Milestone will link it to the start or completion of another Milestone.

Adding Tasks to Milestones

Once you have created the project Milestones you can begin to add tasks that are required to be completed within that Milestone. In the Project Timeline view select the Milestone that the task will belong to by clicking on the Milestone name.



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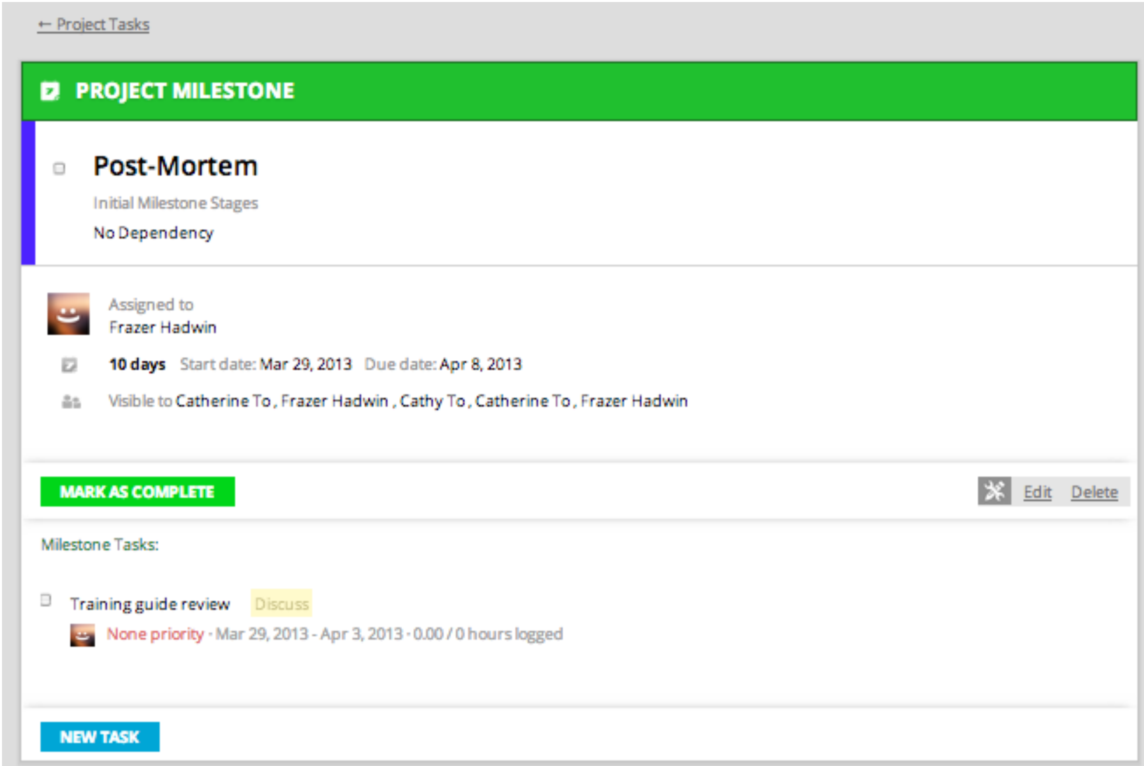
This will open up the Milestone detail page



TOP TIP – clicking on the Project Tasks heading above the Project Milestones title bar will return you to the Project Tasks list.

Tasks will need to be associated with a Milestone, however a Milestone may be a stand alone deliverable that with no associated tasks.

- To add a task to a Milestone click 

- Creating a New task is very similar to creating a new Milestone.
- Name the task in the New Task bar.
- Give the task a start date and deadline (completion date).
- You can assign a task a dependency if it requires another task to be completed before it can be started.
- Assign the task to a team member and signify the task priority.
- Estimate the number or hours that the task with require.
- To add the task click the Add Task button.

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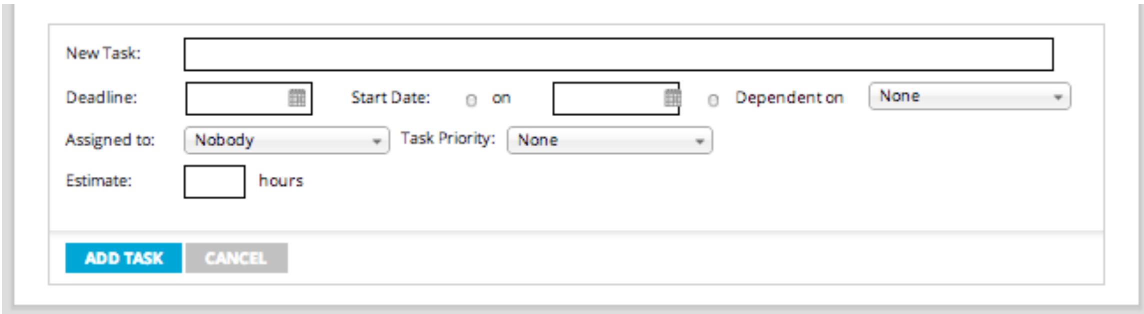

TOP TIP – When a team member logs their time on SWYVEL they will be required to designate which task the time is associated to the Project Manger can then track the projects progress in the Project Timeline screen

Working with Tasks and Milestones

Working with established Tasks and involves a similar interface. Most users will interact with the task screen so we will focus there.

The task screen provides an overview of the task particulars such as;

- Who the task is assigned to
- Start and Due Dates
- Who can view the task
- Estimated time as time logged against the completion of the task

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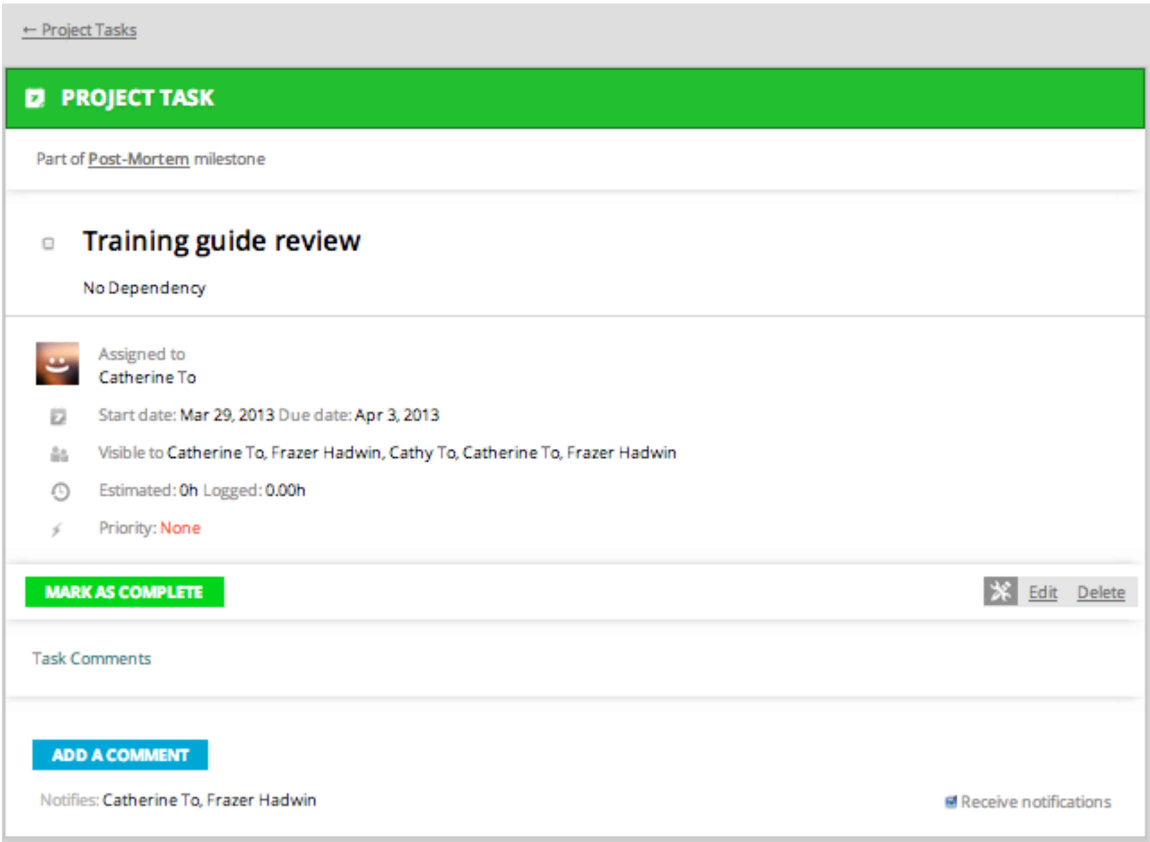
In the task view, you can add a comment to a task, edit the tasks particulars and



mark the task as complete.

The Project Manager or Administrator can export and print a Tasks and Milestones report by selecting either the Export .XLS or Print buttons.

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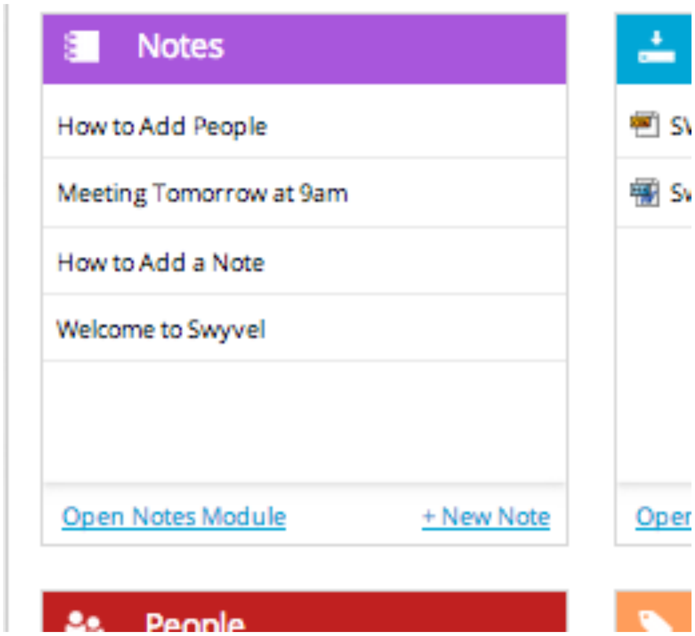
NOTES

Add notes to communicate with people about the projects.



- To add a note and communicate with people within your project, click on the notes module.

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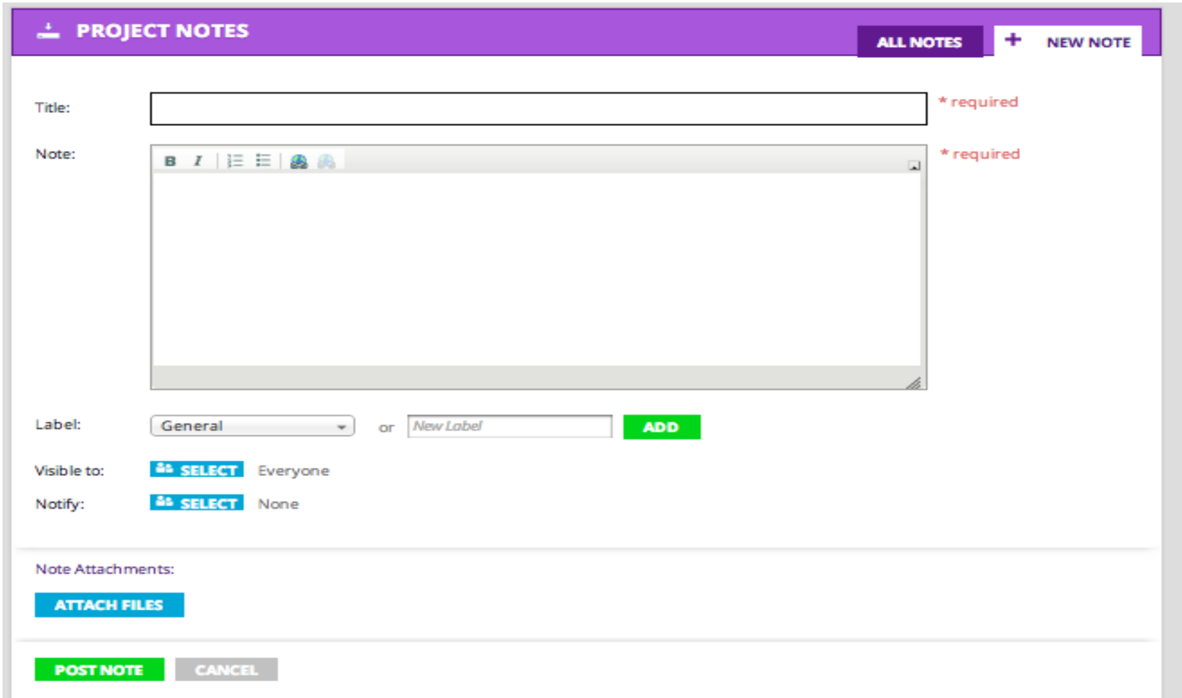

- After clicking on Notes, click on + New Note
- All notes are required to have a title and body of content
- Once you have created your note and attached any relevant files click **POST NOTE**

Label: Create labels to better organize your notes

TOP TIP - This is a great tool to organize you notes in case you don't want to go through all of your notes to find this note again

Visible to: Designates who has permission to view this note.

Notify: Allows you to send an email to notify a note has been posted on your project dashboard.

Add Attachment: Add an attachment to your notes if there is image, document or file associated to your note

TOP TIP - You can click on + New Notes at the bottom right corner to land on + New Note page

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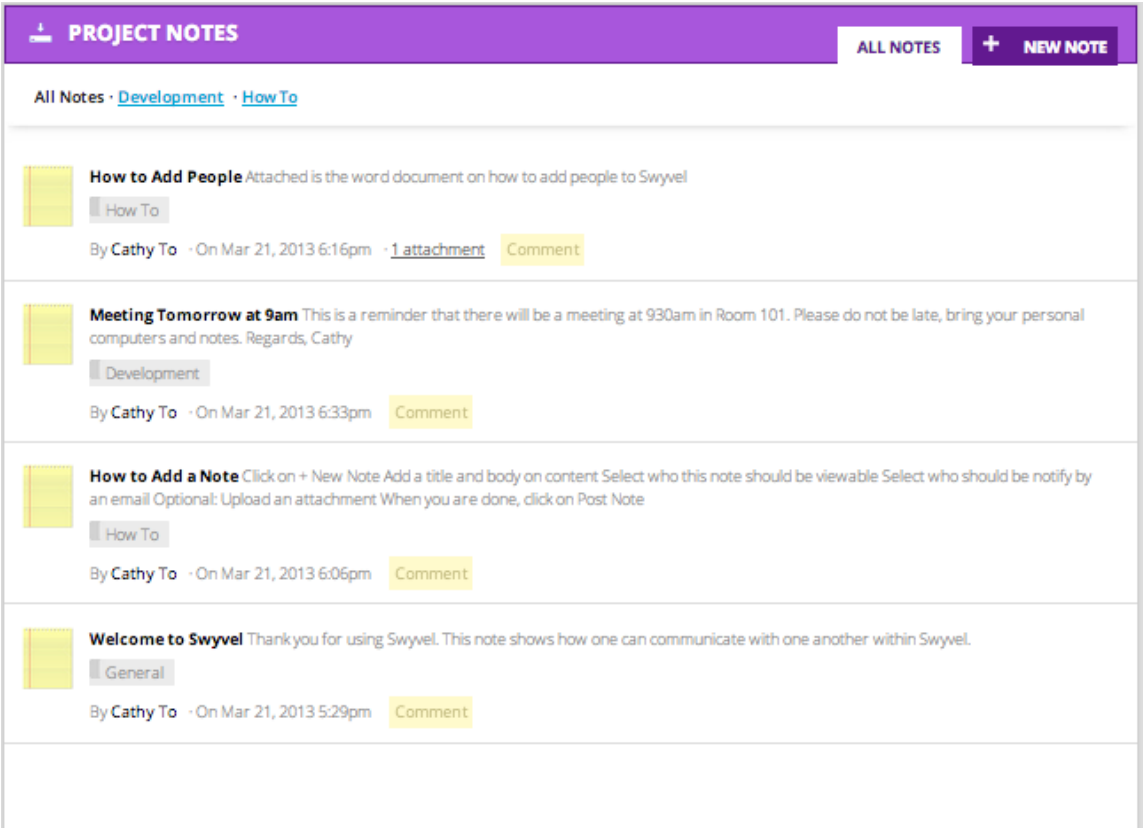
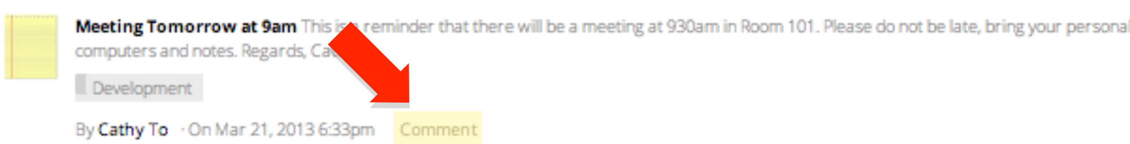


- All of your notes within your projects will appear in All Notes
- Filter you notes by clicking on the blue labels beside All Notes
- Continue the conversation regarding the specific note by adding comments.



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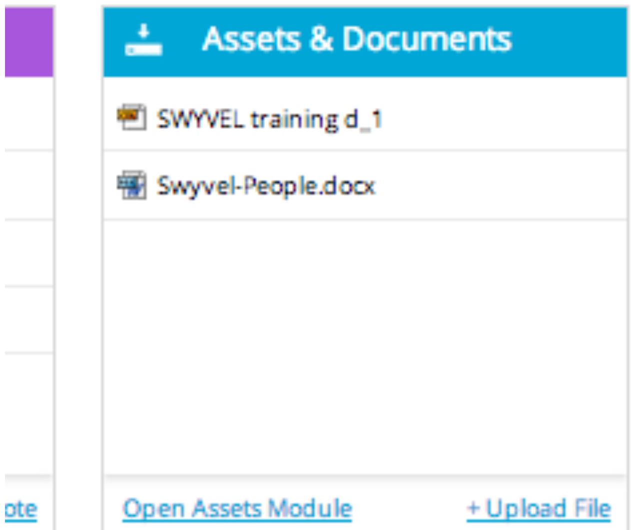
ASSETS & DOCUMENTS

Assets are files, documents, and images used to move the project forward. Upload and share all the information in Assets needed with your team members to complete your project effectively and efficient. Any attachments uploaded in Notes and Tickets can conveniently be found here.



Upload an Asset to Your Project

- To upload a document that is associated to the project and needs to be share, click on Assets in the navigation menu bar or on the banner of the Assets & Documents module found in the Dashboard
- Once you open Assets & Documents, click on + Upload
- There are two ways to select the document which you want to upload
  (1) Upload from you file
    - Click on and a window will open for you to select your wanted document
  (2) Upload from you Dropbox account
    - If you have an account from Dropbox, upload your file from there

- Include details about the assets or any related information to better inform your team so details will be missed

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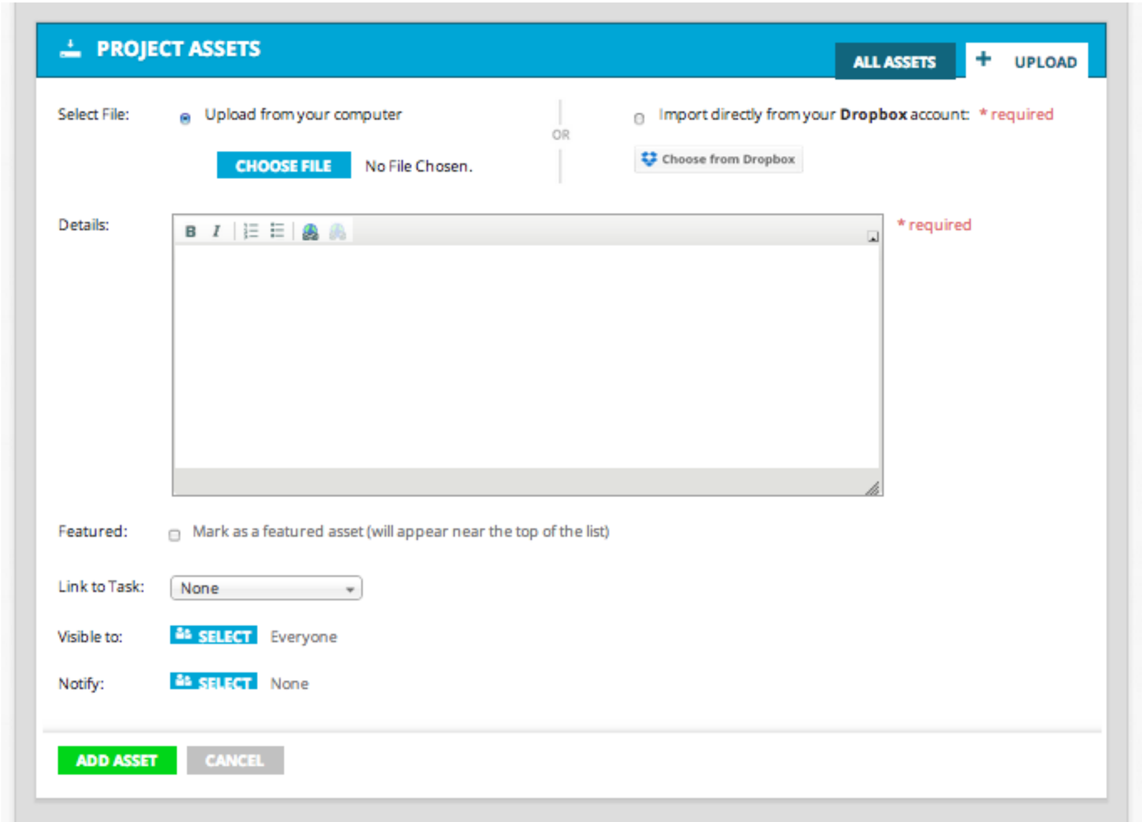

★ TOP TIP – Marking the box Featured: ☐ will make this asset appear near the top of the list, helping everyone find it easier. This is a great option to use if the document is important and needs to be refer to frequently

★ TOP TIP - Selecting Link to Task, a drop-down menu of all the Task will appear to convenient link the asset to your desired Task and it will appear under the View Task page

- By Default, everyone will be able to view your upload asset. You may select a person or a group of people to limit who can view the assets if it is only relevant to certain group people or limit exposure

- Select who should be notified that you have upload an asset by email but clicking on selecting who should be sent an email and then click on save

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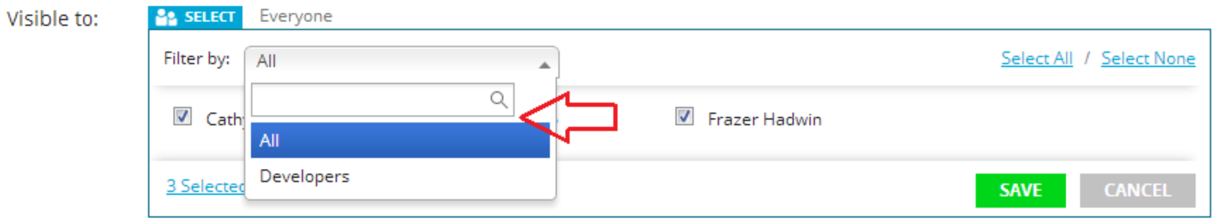
SWYVEL

TOP TIP – Selecting Filter By you may select a group of people (Create in People module) or quickly find a person by typing their name



- When you have completed adding an attachment, adding details and selecting who should be able to view it and be notified, click on 

All Assets

This page allows you to view all the assets which have been uploaded onto this project.

- Organize the assets by the options found in blue besides All Assets under the Project Asset Banner

- To view your assets, click on Download. Assets are now downloaded onto your computer

Add Comment

Add comments to continue to the conversation regarding the asset

- Click on Comment beside the asset
- Add comment in the box
- Add another attachment (For example, an updated asset/document of the previous uploaded one)
- Click on Select to add those that should be notify by email
- When you have completed with adding a comment, click on Select

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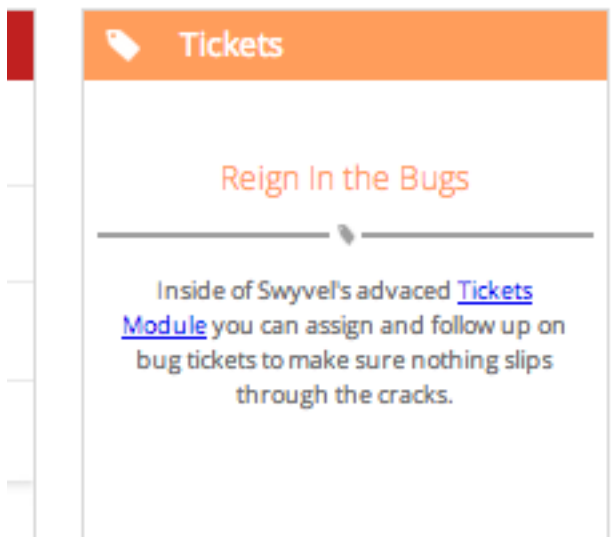
TICKETS

Tickets are bugs, conflicts and problems found in the process of the project development. You are able to log in Tickets and assign who is responsible to resolve it.

- Access Tickets from your navigation menu bar or click on the banner of the ticket to access the ticket module



Once you are in the Tickets Module there are three tabs in the Tickets title bar.

Open Tickets
- Bugs, conflicts and problems that are not resolved yet

Closed Tickets
- Tickets that are resolved

+ New Ticket
- Create new ticket

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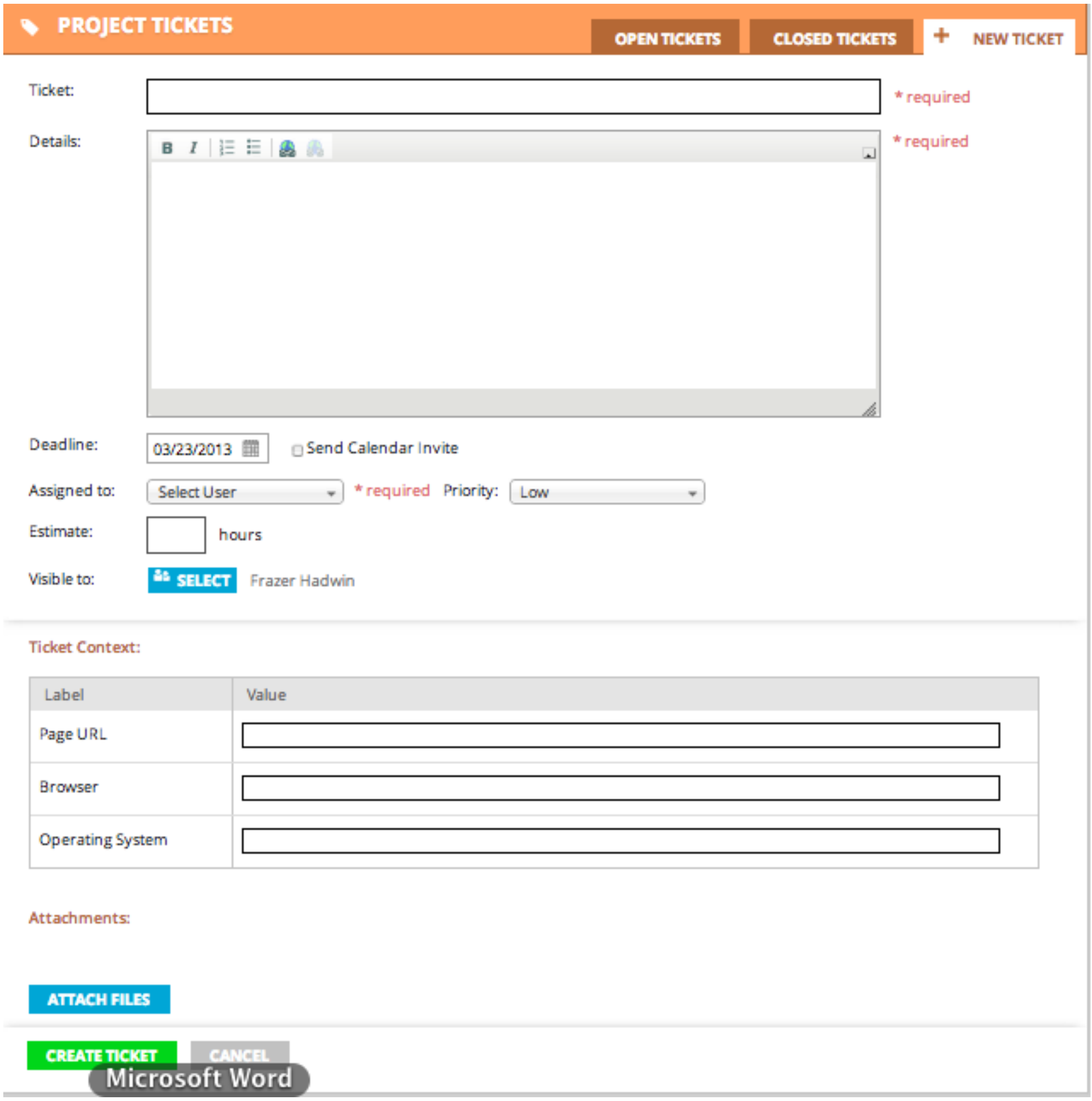
Create a Ticket



- Insert a title in Ticket:
- Add the details of the ticket
- Provide a deadline back either typing the date or conveniently use the calendar to select the date
- Assign the ticket to solve it

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- Set the priority
  - Low: Not urgent
  - Medium: Fairly urgent
  - High: Immediate attention needed
- Optional: Insert estimated hours expected to resolve the ticket
- Optional: Ticket Context, a convenient tool to specify where the problem is especially if it online related
  - Page URL – Copy and paste the Page url where the problem/ticket is found
  - Browser – Indicated which internet browser the problem/ticket appears
  - Operating System – Indicated which operating system the problem/ticket appears in such as Windows 8, Mac, Windows 7
- When you are ready, click on CREATE TICKET

TOP TIP – Attach a file that captures, illustrates or links to the issues. This will help the developer or individual tasked with the ticket see you issue. Taking the time to write a detailed description will help the developer.

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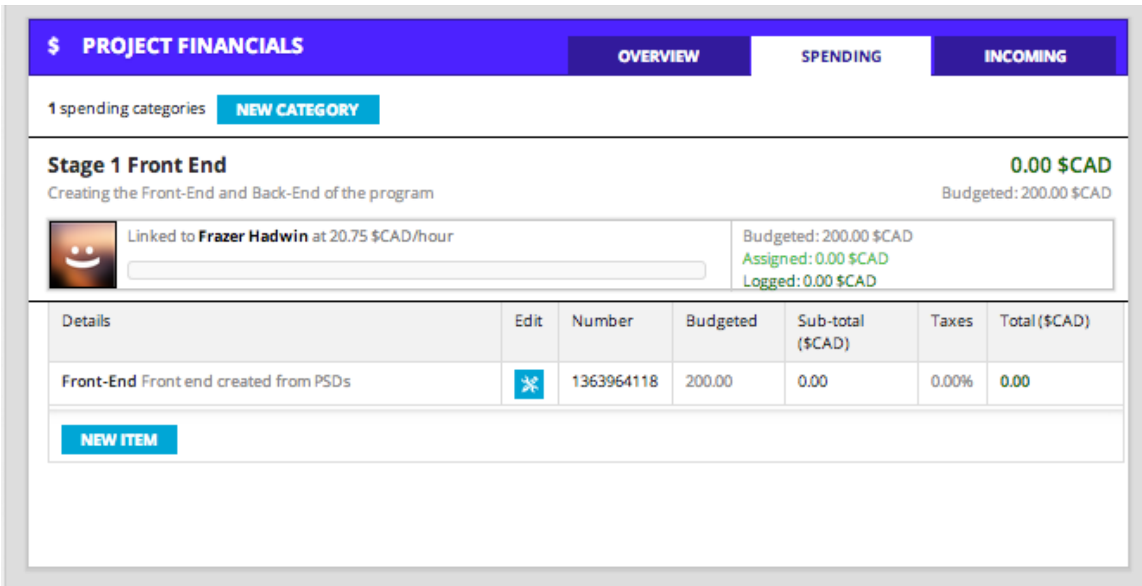
FINANCIALS

Financials allow users who to track the income and expense relating to the project. The financials module will track project costs in real time, including the hours budgeted and accrued in task and milestone tracking.

There are three tabs in Financials



Overview

Shows the summary of the project financial for the project manager and administrator

Spending

This is where the project manager can input all the money that is being spent on the project

- Organize your spending into categories (by expense type, by subcontractor, etc...)
- Add invoices and bills to each category and compare the budgeted amounts with the actuals
- Link spending categories with specific project users and allow them to manage their own invoices

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Income

This is where the project manager can input the money that is being made on the project

- Keep track of client payments for the project
- Add reminders for payments that are owed to you (for additional services, change requests, etc.)
- Or simply set your budget to help you keep track of your expenses

Add Spending

First create a new category
- Click on New Category
- Add a title
- Add a description
- Optional: Link to project user
- Link to a project user: The linked user will be able to see their own information in the Financials tab, add invoices and their logged project hours will be visible
- Click on Add New Category

Edit/Delete Category
- Scroll over the create category, and the Edit/Delete icon will appear
- Perform your edit

Add a new Item under your created item for both Spending and Incoming
- Click on New Item
- Insert a title, description of the spending/new item
- You may either create your own item number or automatically, an item number will be generated
- Select a due date when this will be due
- Insert a budgeted amount
- Insert the actual amount spent (This may be filled out at another time)
- Insert the taxes
- The total will be automatically calculated

Edit Item
- Click on Edit Icon (show button)
- Perform edits

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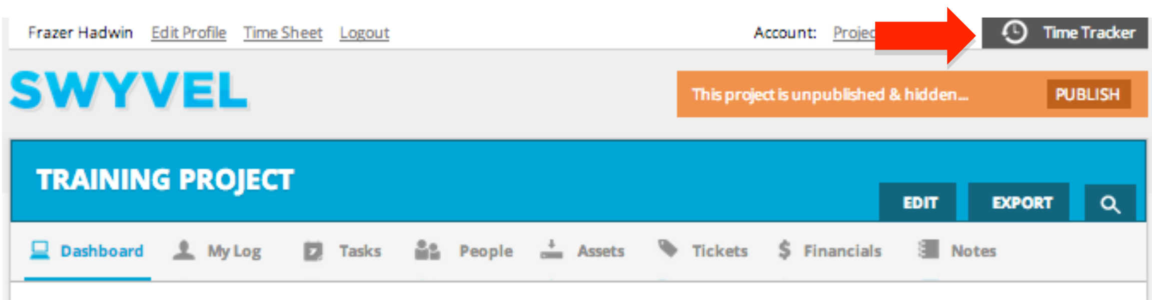
TIME TRACKER

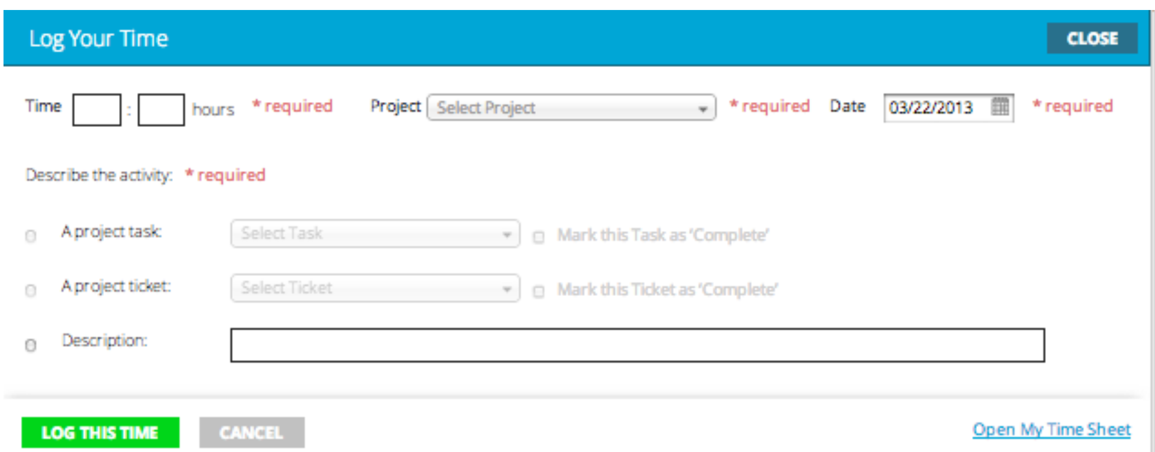
One of SWYVEL's features is the ability to track your time in relation to the tasks in a project. By doing this the Project Manger can get track the budget, scope and time.

Time Tracker runs throughout SWYVEL so you can track time to any project regardless of whether you are working in it at the time.

To access Time Tracker you click on the clock in the top right hand corner of the SWYVEL screen.



When you click on the Time Tracker button it will open a time detail widget that will allow you to enter your time to the appropriate project.



From this point tracking your time is very straightforward. The Project drop down is pre-populated with the projects that you are working on, as are the project tasks and project tickets drop down menus. If your work is not on a specific task or ticket, you can fill out the Description field and check the button to the left of "Description".

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SWYVEL

Clicking on the "Open My Time Sheet" link on the bottom right of this widget will take you directly to a time sheet module that shows all your activities, and allows you to edit any entries.

To finish tracking your time click 

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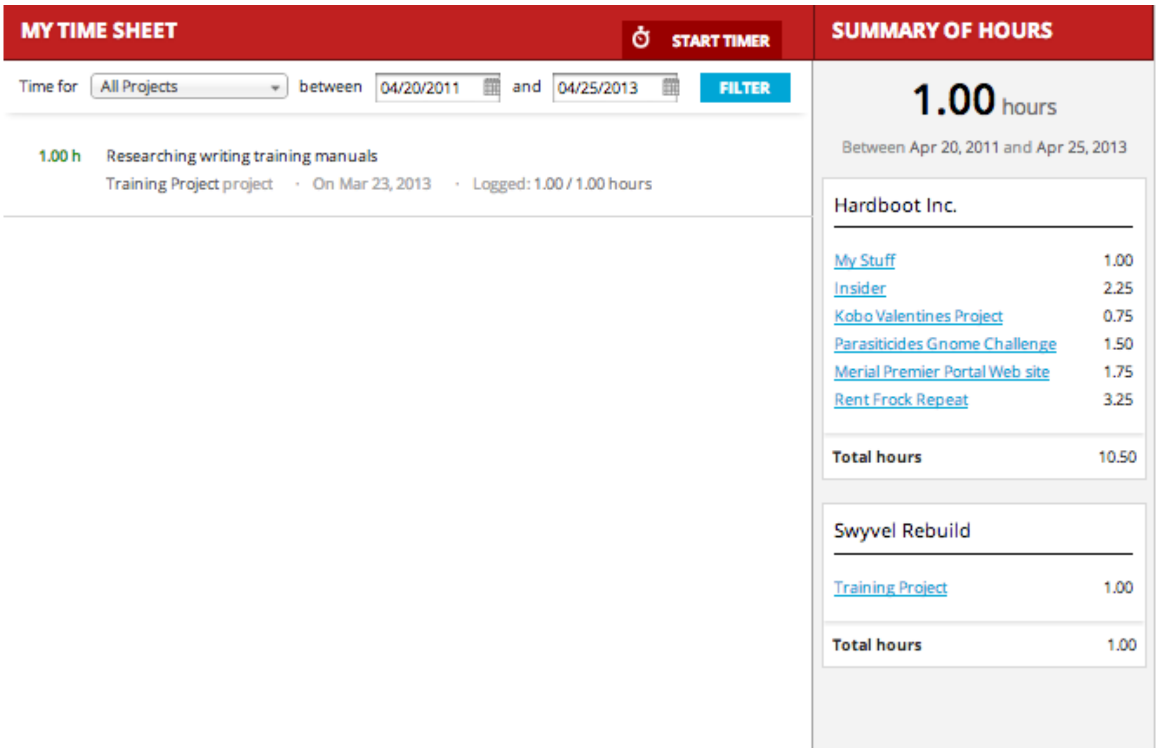
TIME SHEET

Your SWYVEL time sheet is where all of you project activity on SWYVEL is displayed. While you are in you time sheet, you can view all your activity, filter by project or date range, and edit any previous inputs.



To the left of the Time Sheet view is a list of all your activity that includes the summary you created in Time Tracker. By default you will see All Projects ranging from the 1st of the current year until today's date.

Using the drop down menu and the calendar fields you can sort the list by project and/or date. To do this, make the appropriate changes in the "Time for" field, or date fields and click 

To the right of My Time Sheet is a summary of all you logged hours and a breakdown of past and current projects and how the hours listed break down by project. Clicking on a blue project title will bring you to that project's Dashboard.

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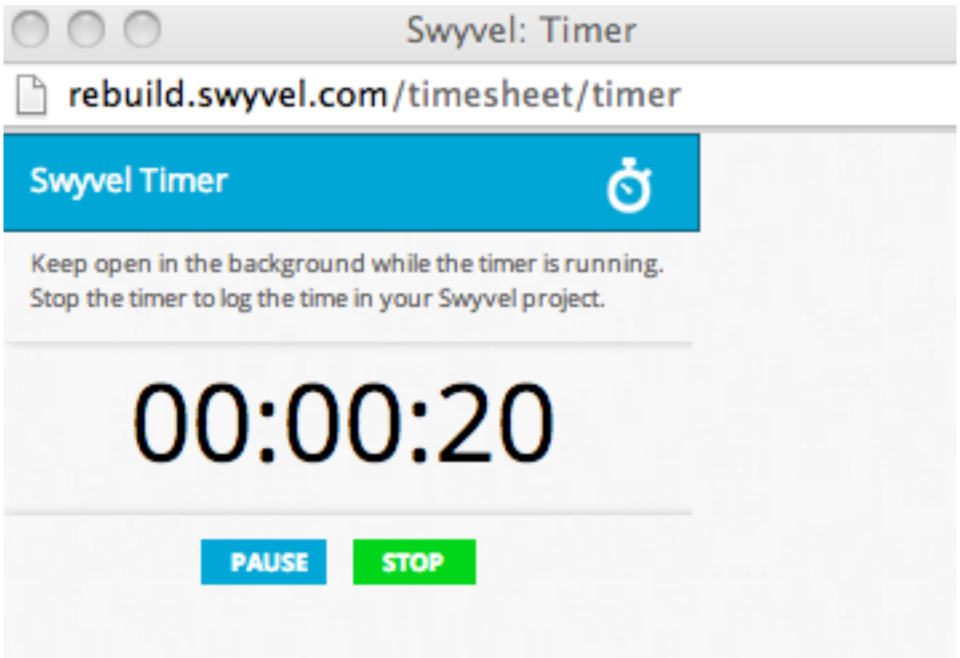
SWYVEL will track your time while you are working, and then prompt you to assign it to


ime Tracker title bar you can start a timer widget by clicking on

This will start the timer widget running in a pop up window.



While you are working, you can pause the timer when you temporarily step away from your project work for meetings, lunch or to work on another activity.

Once you stop the timer it will automatically open the time detail widget that we have already discussed.

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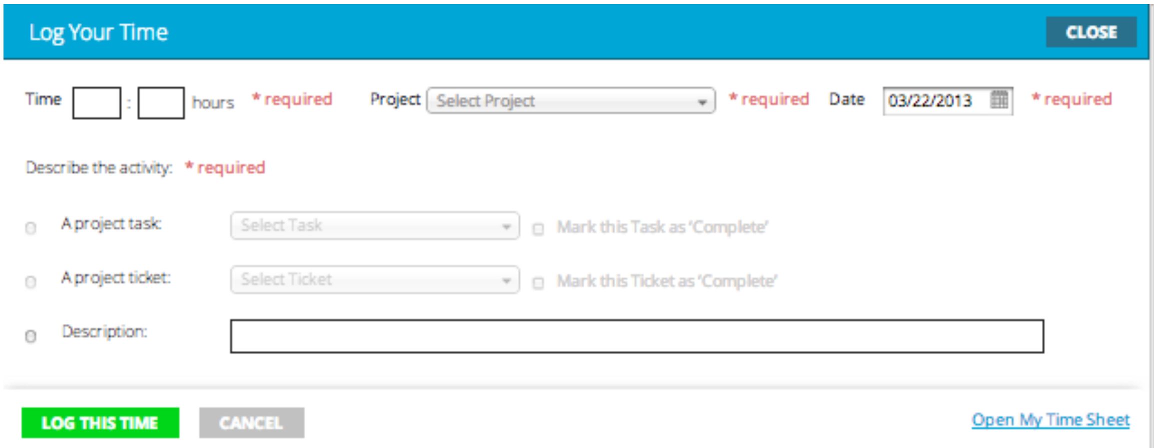

TOP TIP – When you begin working on a project task or ticket, make your time sheet your first stop. Click the Start Timer button to easily track your time. You may have to enable pop ups for the SWYVEL application.

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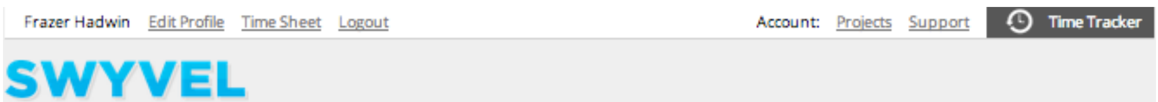
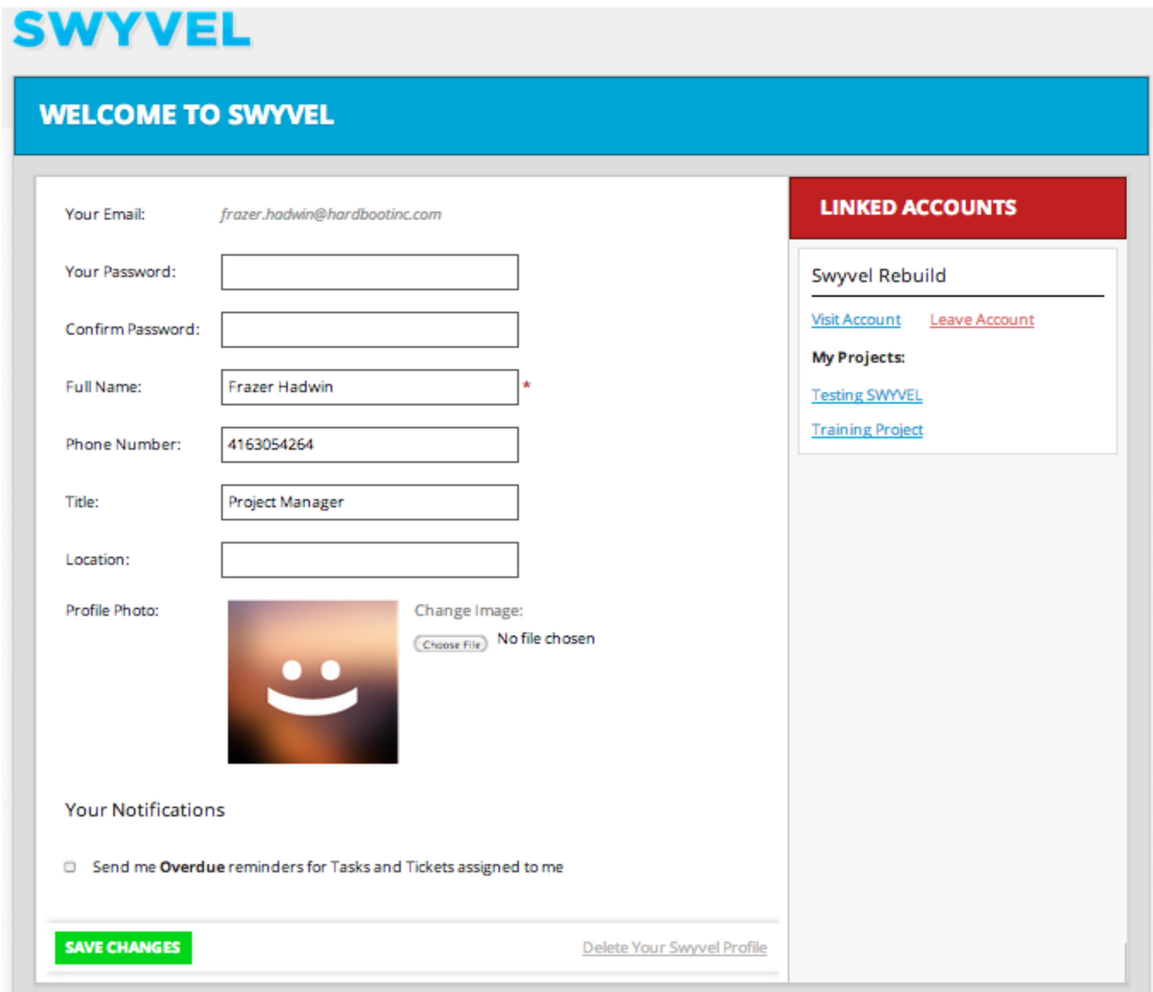
EDIT PROFILE

You can edit your profile in SWYVEL to better match your project status and update your contact information. You can also upload a picture to your SWYVEL profile so remote workers, or workers in other locations will recognize you at meetings.

To edit your profile click on the Edit Profile link located on the top or your browser



window above the SWYVEL title bar. You will be redirected to your profile details page.



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You are probably familiar with most of the actions that you can perform on your Profile page. Here you can change your password, you name as it appears to other users, add you phone number and location as well as you job title.

Only an Administrator can change your email address, however this will usually be the address that is associated with the organization performing the project.

On the right of your profile page you can see all the projects that you are involved with and can click on the project name to be taken directly to that projects dashboard.

TOP TIP – selecting the send overdue reminders on the bottom of the Profile page will help keep a handle on your tasks and tickets.

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